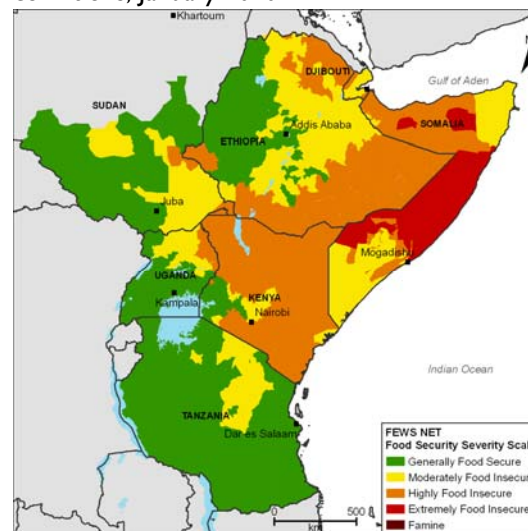


EAST AFRICA Regional Food Security Outlook

January to June 2010

- Regional food security conditions have gradually improved since the last quarter of 2009, due to improved pasture and water availability, and increased livestock production and prices in the main pastoral areas, as well as improved crop production in the lowland marginal cropping and agropastoral areas caused by the mild-moderate El Niño rains. The bulk of the currently highly or extremely food insecure population, estimated at about 17 million people by late 2009, is located in the pastoral and marginal cropping areas of the eastern sector of the region (Figure 1).
- In the most-likely scenario for January to March 2010, food security conditions in southern Sudan, Ethiopia, central Somalia, and Djibouti are expected to worsen, due to the combined impacts of poor 2009 rainfall, several consecutive poor or failed seasons, and high food prices. An early start to the hunger season is expected in these areas. In Somalia and southern Sudan, high levels of conflict are also deepening food insecurity and hindering the delivery of food assistance. In contrast, food security conditions are expected to improve from January to March in parts of Kenya, Tanzania, Uganda, and southern Somalia. In pastoral areas, good rains in December and into January have supported environmental regeneration and improved livestock body conditions and livestock to cereal terms of trade. In some cropping areas, average to above-average crop production is expected.

Figure 1. Current estimated food security conditions, January 2010



Source: FEWS NET

For more information on FEWS NET's Food Insecurity Severity Scale, please see:
www.fews.net/FoodInsecurityScale

- During April to June, food insecurity is not expected to improve in the areas already facing high or extreme food insecurity in southern Sudan, northeastern Uganda, Ethiopia, central Somalia, and Djibouti, and could even worsen as any remaining harvests will likely become exhausted. Although March to May rains will improve pasture and cropping conditions across the region, provided that rains are normal, significant improvements in food security will not be realized during this period, as herd recovery will take longer. In contrast, in Kenya, Tanzania, and southern Somalia, sustained improvements in food security are expected, with enhanced livestock birth rates, increased milk availability, increased livestock prices, and expected normal to above-normal crop production based on a tentative forecast for near-normal March–May rains. Furthermore, food stocks from the October to December rains harvest will still be available in some areas. However, overall improvements in food security will be moderated by continued high cereal prices, especially in non-producing areas, and cereal export bans, which would limit the flow of cereals to non-producing areas during this period.

Current food security conditions

Although there are indications of gradual improvements in food security since the end of 2009, nearly 17 million people remain highly or extremely food insecure (including over 14 million people in Ethiopia, Somalia, and Kenya) due to consecutive poor rains and drought conditions (mainly in the pastoralist-dominated eastern sector); poor crop harvests, especially in Ethiopia and southern Sudan; above-average food prices; and continuing civil insecurity, particularly in Somalia, southern Sudan, northern Kenya, northeastern Uganda, and southeastern Ethiopia. The lingering effects of past

shocks—principally drought and asset loss—have also weakened the ability of pastoralists to withstand these hardships. Despite near-normal crop harvest levels in the most of the high-potential western half of the region in recent years, poor market integration of the food-deficit eastern sector with the main production areas, as well as cereal export bans by some countries, have meant that the benefits of increased crop harvests did not reach the food deficit areas. Ongoing assessments in the region are likely to revise the estimated size of the food insecure population downwards from the first quarter of 2010.

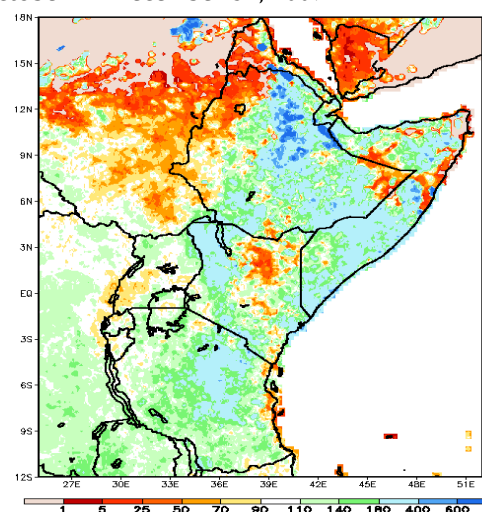
The current largely modest improvements in food security conditions are mainly due to near-normal to above-normal October to December rains associated with the El Niño phenomenon. The rains enabled improved crop production, rangeland conditions, and livestock production in many of the drought-affected areas. The good rains ended a pattern of consecutive rainfall failures experienced in the last 3-5 seasons, in the worst affected eastern sector of the region. As a result, food security conditions are beginning to improve due to increased food availability from October to December seasonal crop harvests and improved livestock body conditions and prices, and to a lesser extent, milk production. In southern Somalia, normal *deyr* (October to December) harvests and improved livestock body conditions have increased food security. In Kenya's southeastern and coastal marginal cropping areas, near-normal crops are expected for the first time in about four consecutive seasons. Improvements have also been noted in most of the southeastern parts of Ethiopia, where pastoralists and agropastoralists are experiencing improved production, livestock prices, and humanitarian access.

Despite the overall improvements, areas of food insecurity remain including: (i) Djibouti, where the failure of the coastal rains, persistent high food and fuel prices are pushing northwestern pastoralist households towards extreme food insecurity; (ii) southern Sudan and central-western Ethiopia, where El Niño had a depressing effect on the main 2009 rains, resulting in overall reduced crop production; and (iii) central and Hiran regions of Somalia, where below-normal seasonal rains and ongoing high levels of conflict and insecurity are resulting in extreme levels of food insecurity. Furthermore, even in pastoral and agropastoral areas that had good rains, improvements in food security have only been marginal, due to high livestock mortalities, and low livestock conception and birthing rates, which require several consecutive good seasons for any reasonable recovery to take place. Civil insecurity and displacements, market disruptions, and reduced humanitarian access are important factors worsening food insecurity in Somalia and southern Sudan, whereas increasing urban food insecurity continues to grow in significance across the region.

Seasonal Overview

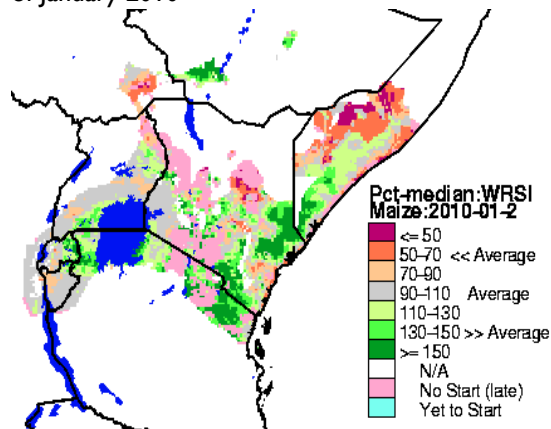
January is the start of a generally dry period in the equatorial and northern sectors of the region. In the southern parts, mainly Tanzania, the main rainfall season continues through May. The October to December rains usually occur in the equatorial parts of the region covering most of Somalia, the southern half of Ethiopia, most of Kenya, and bimodal areas of Tanzania and Uganda, as well as most of Burundi and Rwanda. Although these are the lesser rains in most of these areas, they are crucial in ensuring good pasture regeneration, water replenishment and crop production, right before the long and dry January to March season. The performance of these rains was mixed as both geographic and temporal distribution were irregular. Although in terms of amount, most areas received near normal to above normal quantities, the month of November was largely dry while the months of October and December brought heavy downpours in different parts of the region. There also still remain drier than normal areas including parts of north-central Kenya, the eastern part of the Somali region of Ethiopia, and central/northeast Somalia, where both total

Figure 2: Rainfall Performance, percent of normal, October 1– December 31, 2009



Source: USGS/FEWS NET

Figure 3: Cropping conditions in the second dekad of January 2010



Source: USGS/FEWS NET

amounts and temporal distribution were poor (Figure 2). In these areas, poor rangeland/pasture conditions are expected to continue until the start of March to May seasonal rains.

Although some areas show below-normal rainfall conditions in the southeastern marginal agricultural areas of Kenya, the resumption of heavy rains in December provided favourable cropping conditions for the late-planted crops (Figure 3). The southern pastoral areas along the Kenya/Tanzania border and northwestern pastoral areas experienced localized heavy flooding associated with loss of assets (housing and livestock), displacement, destruction of infrastructure and increased water-borne diseases. The continuation of these heavy rains into Tanzania also caused similar damages in the contiguous areas of northeastern Tanzania. Following the seasonal norm, rainfall in the region has shifted to the southern sector, mainly in Tanzania, where rainfall so far has been normal to above normal.

Most-likely food security scenario, January to June 2010

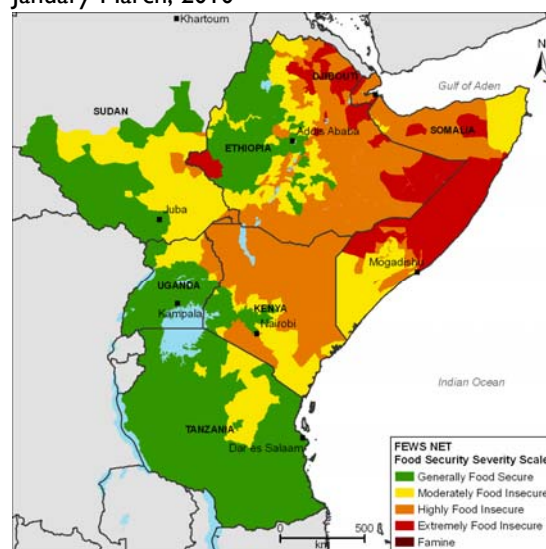
The most likely food security scenario for the January to March season will depend, to a large extent on (i) the performance of the March-May seasonal rains, (ii) the outcomes of the October to December 2009 production season in Kenya, Ethiopia, Sudan, and Uganda, (iii) the behavior of staple food prices and markets, and (iv) the status of civil insecurity and displacement during the quarter. The following assumptions about the above factors underlie the most likely food security scenario:

- Largely near normal to above-normal performance of October - December seasonal rains will result in above-normal crop production in the marginal cropping areas ;
- Rainfall will not continue well into February 2010;
- Milder and shorter than normal January to March dry season due to residual water and pasture availability;
- Near-normal rainfall conditions during the main November to May (*msimu*) cropping season in Tanzania, resulting in average to above-average crop performance;
- Household food stocks and market supply of local cereal produce will diminish much earlier than normal in southern Sudan and Ethiopia;
- Staple food prices remain at the current levels of above the recent 5-year average, with marginal declines seen during the quarter in response to harvests, albeit below normal;
- Civil insecurity/conflict, displacement and reduced humanitarian space continue, particularly in south-central Somalia and parts of southern Sudan, while resource-based insecurity continues in northern Kenya, southeastern Ethiopia and northeastern Uganda.

General improvements in food security conditions are expected across the pastoral and marginal cropping areas in the eastern sector from January to March (Figure 4). Continued improvement is expected in most of the pastoral areas, where improved rangelands conditions will enhance livestock body conditions and livestock prices, as well as ease the costs of water trucking. Improvements are also expected in southern pastoral areas along the Kenya/Tanzania border as well as northwestern Kenya. However, the recovery process will be slowed by the short-term disruptions caused by heavy flooding in these areas, which are likely to cause loss of livestock assets and in some cases extensive damage to road infrastructure. Damage to infrastructure is likely to increase transport costs and sustain the high prices for staple foods, and consequently erode potential improvements in pastoral terms of trade. However, substantive recovery of the pastoral livelihood is not expected during the quarter as livestock conception and reproduction would take some time and further recovery will be contingent on the good performance of the upcoming March to May season.

Good production is expected from the marginal agricultural lowlands of Kenya due to increased cropped areas and favorable heavy rains in December after a long mid-season dry-spell in November. Similarly the food security situation in

Figure 4. Most likely food security scenario, January-March, 2010



Source: FEWS NET

southern Somalia is likely to improve following a normal *deyr* harvest. Even in Ethiopia, where the harvests were poorer than normal in late 2009, improvements in food supply accompanied by marginally declining prices are expected to bring temporary relief to the most food insecure households in eastern, northeastern, and southern areas.

The performance of the rains during the outlook period is essential for the maturation of the main crop in Tanzania. Latest satellite images show that the rains have shifted to central and southern Tanzania. If the El Niño event holds for this area, the rains would support favorable cropping conditions, although there is the risk of localized post-harvest losses and damage to standing crops if rains are excessive. However, the contribution of this favourable cropping to regional food security would be limited by the current cereal export ban.

Despite these generally positive changes, some areas will continue to experience high and extreme food insecurity. These areas include central Somalia, the Warder zone of eastern Ethiopia, and parts of northern Kenya, where pastures and water sources may not last until the next rainy season starting in April 2010, because conditions are already below normal. In Somalia, the continued insecurity and displacement, especially in central regions, will sustain extreme food insecurity. In southern Sudan, declining stocks are likely to bring about earlier than normal food shortages towards the end of the quarter due to a poor harvest in August/September 2009. This condition could be worsened by persistent insecurity in southern Sudan, which would hinder market access and trade. In Djibouti, the northwestern pastoral groups will likely remain highly food insecure due to the drier than normal season and persistent high prices; a significant number of pastoral and urban poor groups will also face moderate to high food insecurity.

Overall, food security conditions in the January to March period are likely to improve further in the pastoral and marginal agricultural areas; in southern Sudan, Ethiopia, central Somalia, Djibouti, a deterioration in food security situation is expected in the first quarter of 2010. The population facing high to extreme food insecurity is likely to remain around the current figure of 17 million, with marginal reductions.

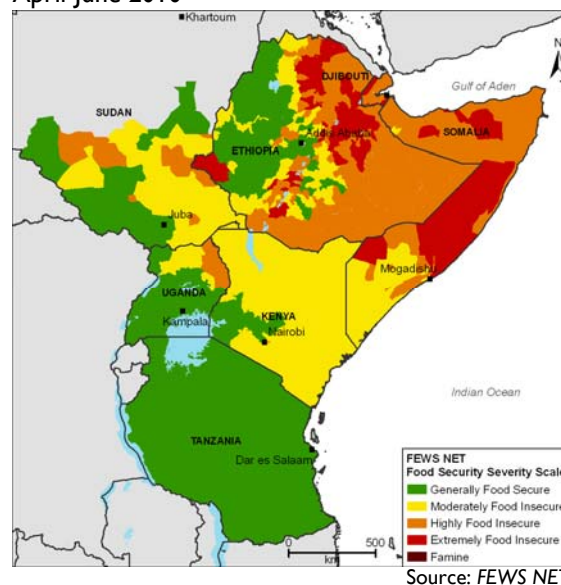
The analysis of the most likely food security scenario for the April to June 2010 period (Figure 5) is based on the following assumptions:

- Near-normal rainfall conditions during the March-May season in pastoral areas and the agropastoral eastern sector;
- Near-normal to above-normal rainfall in other cropping areas;
- Normal to above-normal *msimu* harvest in Tanzania but regional benefits diminished by the cereal export ban;
- Above-average staple food prices which may start to increase in response to the start of the hunger season in parts of Ethiopia, Kenya, southern Sudan, and Somalia;
- Conflict and insecurity unlikely to abate in the affected countries, especially Somalia and southern Sudan.

This outlook period covers the main March to May rainfall season. It is too early to project the March to May seasonal forecast with certainty, although a tentative forecast issued by IRI and ECMWF¹ in December suggest a near-normal season. This forecast will be confirmed by the Climate Outlook Forum consensus forecast planned for February 2010.

Near-normal rainfall conditions would have different implications for the pastoral and cropping areas. In the pastoral areas, experience shows that near-normal rainfall conditions, even after the previous near-normal rains, may not be sufficient for recovery. Also, this rainy season may be a transition period from the wetter El Niño conditions to a La Niña event, which is usually characterized by reduced rainfall amounts, as a La Niña event usually follows most El Niño events. As a result, even if the forecasts allude to near-normal March to May rains, the season could turn out to be drier than normal, especially in the lowland pastoral and agropastoral areas. This would affect areas of north-central Kenya, the eastern part of the Somali region of Ethiopia, and parts of central/northeast Somalia, which have exhibited below normal conditions throughout the October-December season to date (Figure 2) where such a forecast

Figure 5: Most likely food security scenario, April-June 2010



Source: FEWS NET

¹ IRI—International Research Institute for Climate and Society; ECMWF—European Centre for Medium Range Weather Forecasting

would mean the continuation of below-normal conditions, resulting in continued livestock migration, lack of milk and animal products, high malnutrition, and increased resource-based conflicts, pushing some households into moderate and in some cases to extreme food insecurity. In other pastoral areas, the near-normal rains will improve pasture conditions across the region, but significant improvements in food security will not be realized during this period, as herd recovery will take longer.

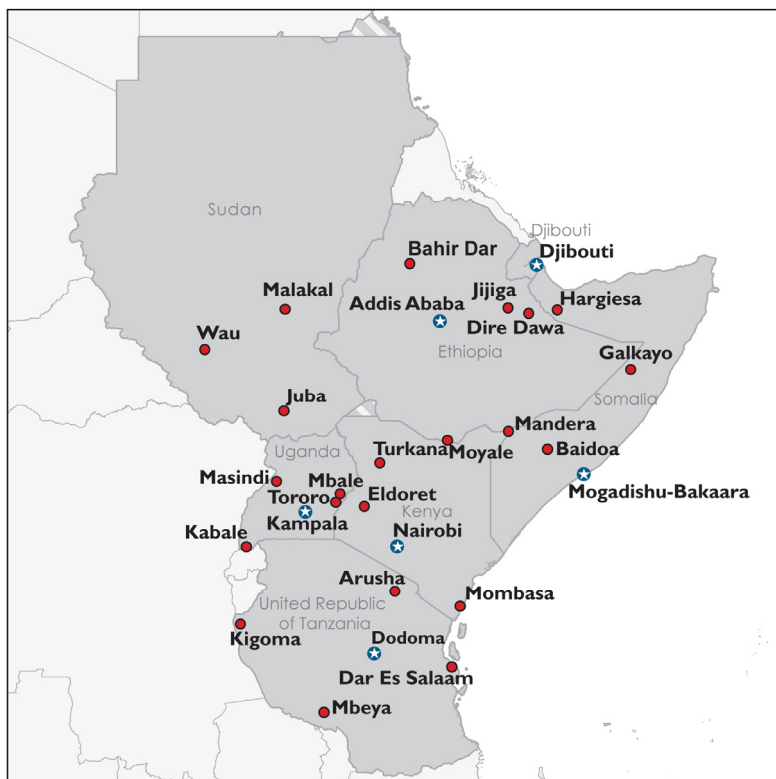
As for the cropping areas, the tentative near-normal forecast would be sufficient for favorable cropping in Kenya, Tanzania, bimodal cropping areas of Uganda, as well as Rwanda and Burundi. There is continued expectation of improved food security conditions in Kenya, Tanzania and southern Somalia as food stocks from the short rains harvest will still be available. However, this will be moderated by continued high cereal prices, especially in non-producing areas and the effect of cereal export bans in the region, particularly in Tanzania, which would hinder movement of cereals to non-producing areas.

Food insecurity will remain at high and, in some areas, extreme levels during April to June in south Sudan, northeastern Uganda, Ethiopia, northern Somalia, and Djibouti, as any remaining harvests will become exhausted and the effects of the acute hunger season continue. As in the current food security conditions and previous food security scenario, both civil insecurity/conflict and staple food prices are unlikely to change significantly and will continue to be a constraint in the worst-affected countries. Insecurity/conflict will continue to affect market access due to insecurity on the roads, disrupt humanitarian access, and potentially continue to cause population displacements, which could undermine food security.

Table 1: Events that could affect the food security outlook

Geographic Focus Area	Possible events in the next 6 months that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence *	Key variables to monitor
Pastoral areas— (southeastern Ethiopia, northeastern Kenya, and south - central Somalia & Northeastern Uganda and Marginal agricultural areas (South-eastern lowlands and northeastern border area of Tanzania)	• Continued rains into January and February	• Continued pasture regeneration and water replenishment in pastoral areas	Very unlikely	Unseasonable rains during the January–March season
		• Longer cropping season translating into increased crop production.	Unlikely	Rainfall totals and distribution Staple crop production
Tanzania	• Excessive <i>msimu</i> rainfall	• Increased risk of flooding • High post-harvest losses • Damage to standing crops	Unlikely	Rainfall totals and distribution
Somalia and southern Sudan	• civil insecurity and conflicts subside significantly/sufficiently so as not to be a major food insecurity driver	• significant strengthening of the affected populations coping ability; • resettlement of displaced groups; • improved access to conflict-restricted markets and productive resources	Unlikely	Conflict/insecurity incidences; Human displacement

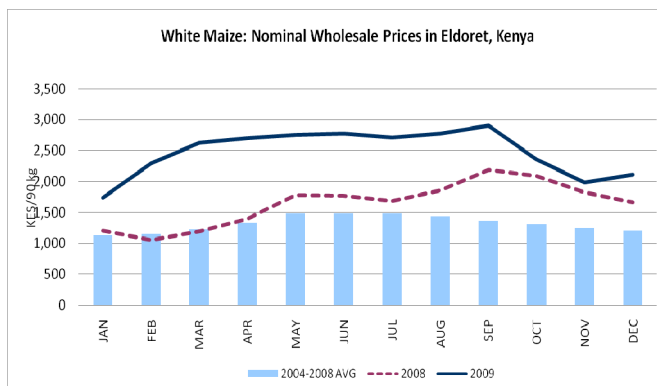
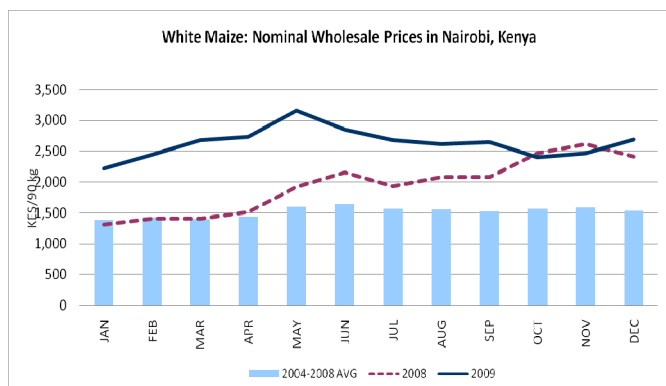
* Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly



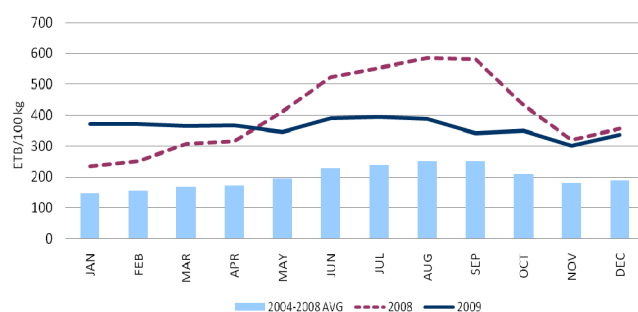
Monthly prices are supplied by FEWS NET enumerators and a range of partners: in Ethiopia, the Central Statistics Agency and FEWS NET; in Kenya, the Ministry of Agriculture (Market Research Branch); in Uganda, the Uganda Market Information System; in Tanzania, the Ministry of Trade, Industries, and Marketing; in Djibouti, the Ministry of Finance; in Somalia, FEWS NET; in Sudan, WFP.

White maize is the main staple grain consumed in Tanzania, Kenya, and Ethiopia. In Uganda, white maize is grown mainly as a commercial crop for export in the region. Imported rice is a major staple for Djibouti and Somalia, which mainly consume *belem*—the imported red rice. Tanzania is also a major producer and source of rice in the region while Kenya and Uganda are minor producers. Both red and white sorghum are produced and consumed in the region. This is an important staple in Sudan, Djibouti and Somalia as well as in other marginal agricultural areas of the region. It is also a substitute cereal among the rural poor. Red sorghum is mainly grown in Ethiopia, Sudan, and Somalia, and is the preferred type for households in Djibouti. Beans are an important source of protein and a complementary food crop grown in the high potential agricultural areas of Kenya, Uganda, Tanzania, Rwanda, Burundi and Ethiopia. It is consumed across household types. Maize and beans are the most heavily traded commodities in the region. The cooking banana—*matoke*—is the primary staple in Uganda. Uganda is also a main source of cooking and other types of bananas traded in the region especially in Southern Sudan. However, bananas are not trade nearly as heavily as maize or beans.

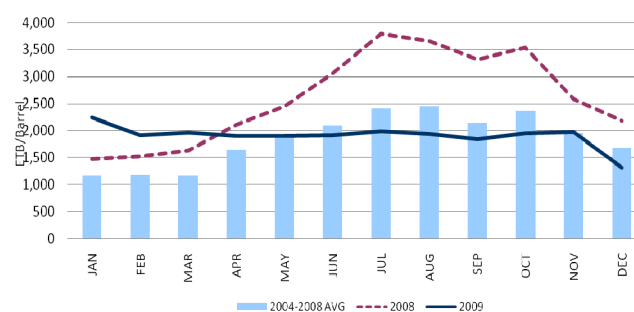
WHITE MAIZE: The markets below represent the major producer and consumer markets in countries where white maize is heavily consumed as the staple.



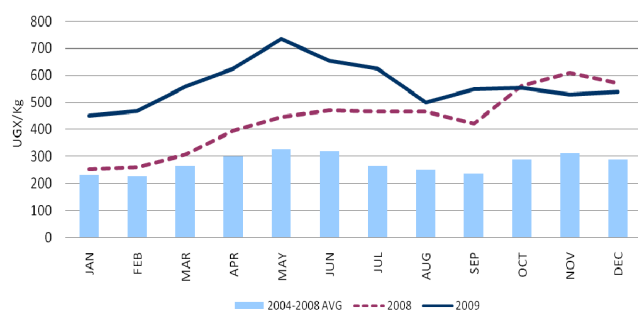
White Maize: Nominal Wholesale Prices in Addis Ababa, Ethiopia



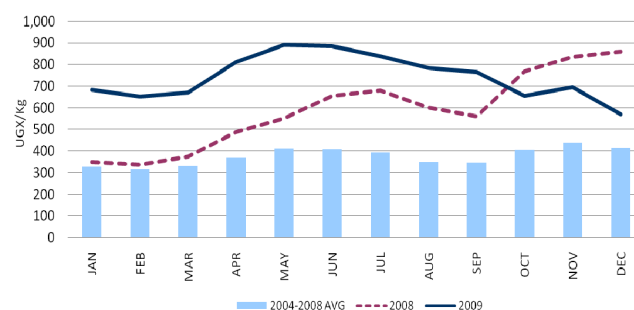
White Maize: Nominal Wholesale Prices in Bahir Dar, Ethiopia



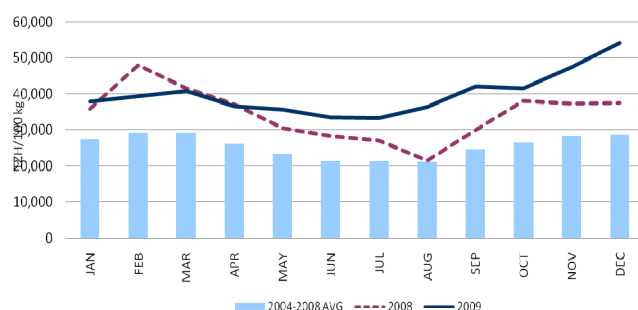
White Maize: Nominal Wholesale Prices in Kampala, Uganda



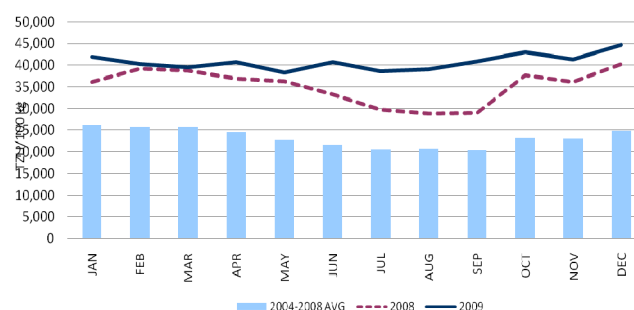
White Maize: Nominal Wholesale Prices in Kampala, Uganda



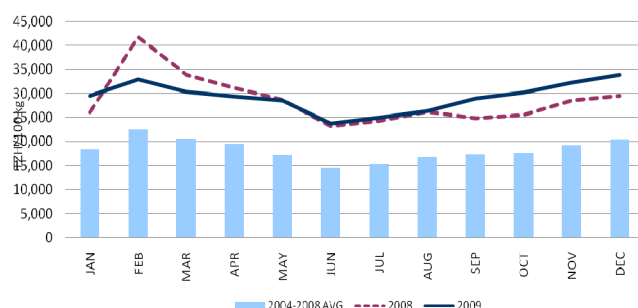
White Maize: Nominal Wholesale Prices in Kigoma, Tanzania



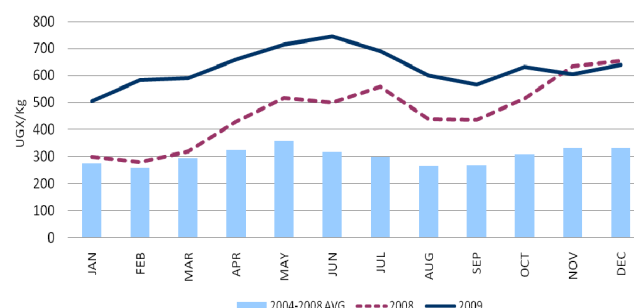
White Maize: Nominal Wholesale Prices in Dar es Salaam, Tanzania



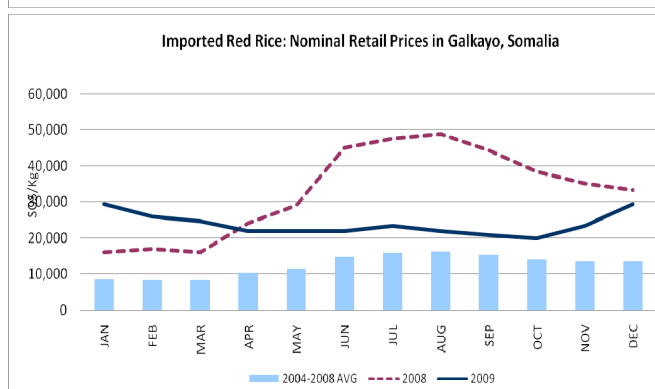
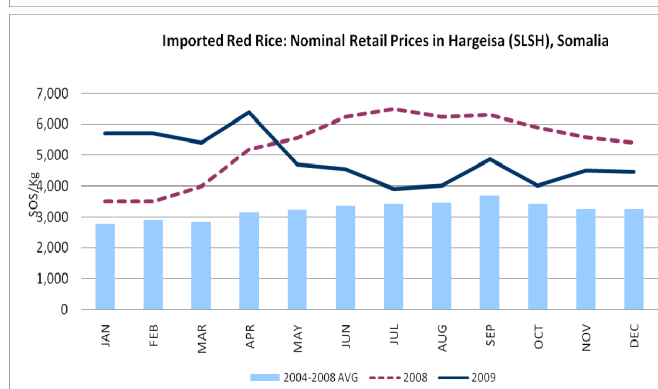
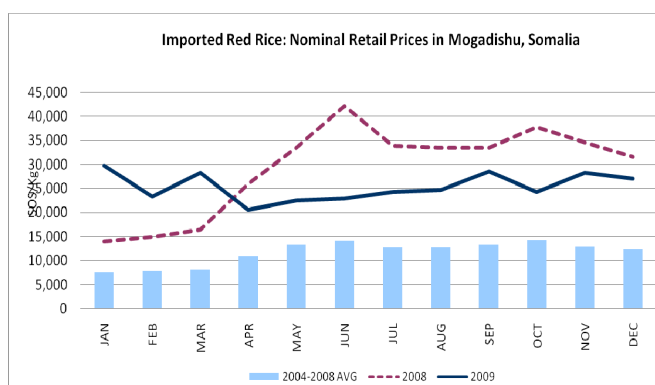
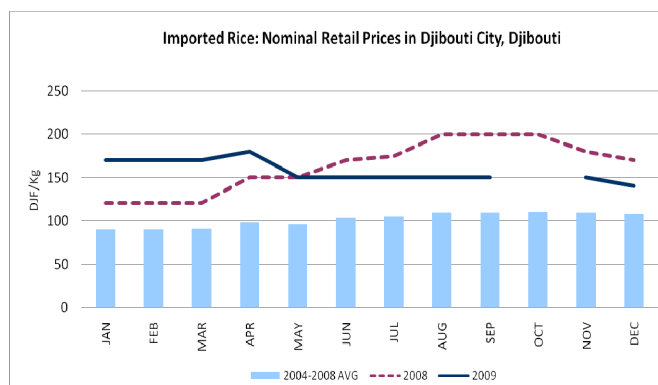
White Maize: Nominal Wholesale Prices in Mbeya, Tanzania



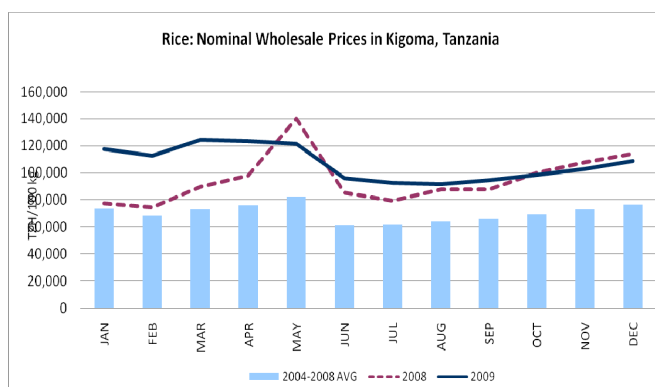
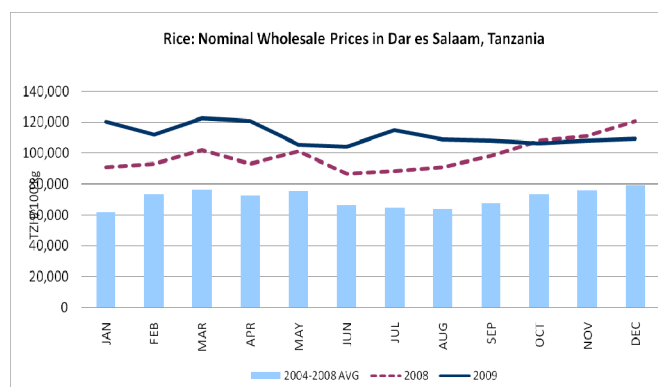
White Maize: Nominal Wholesale Prices in Tororo, Uganda



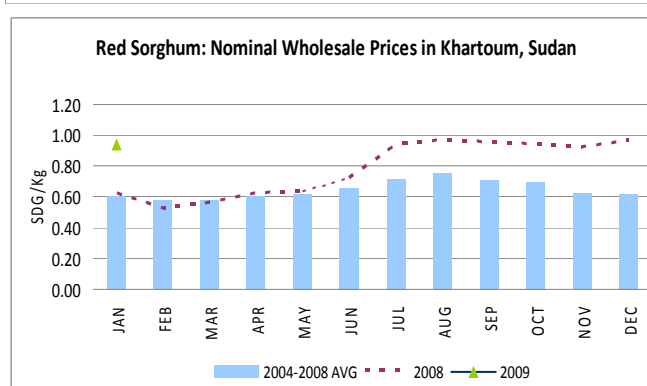
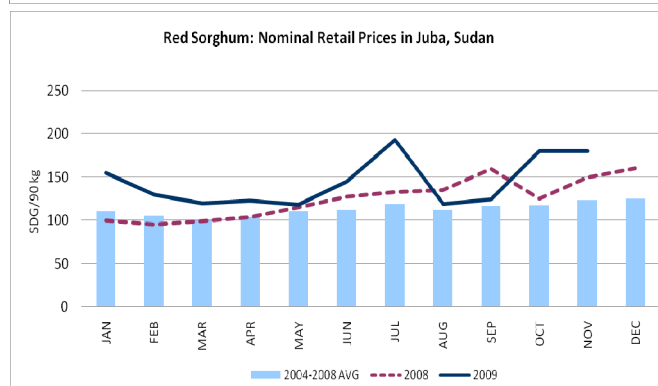
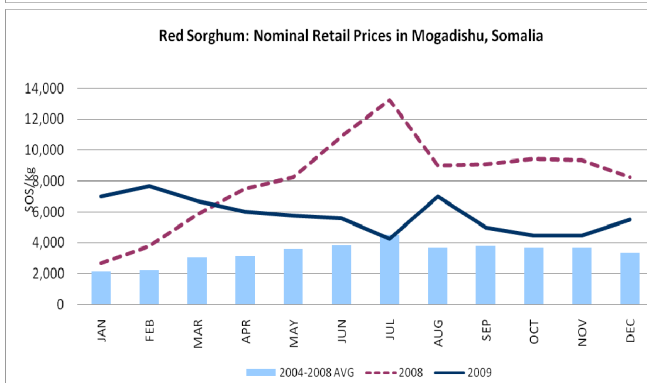
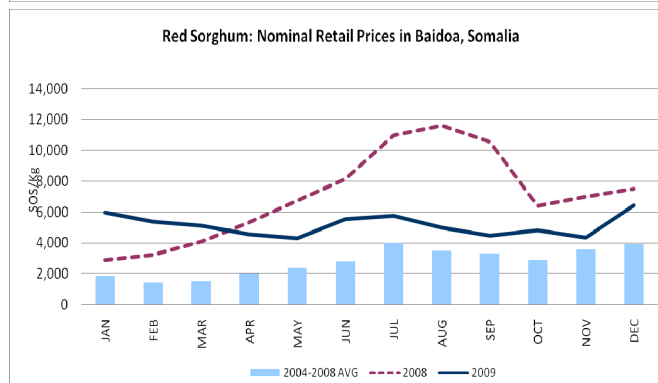
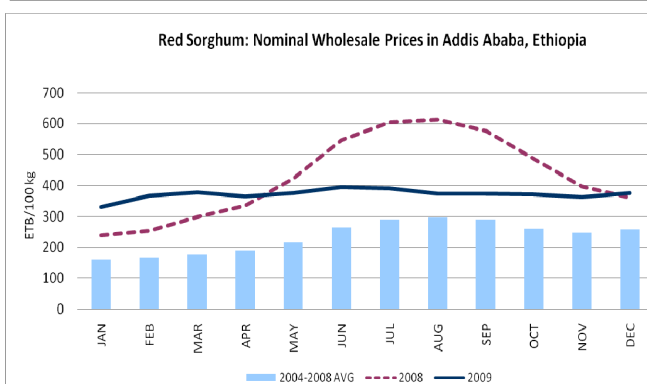
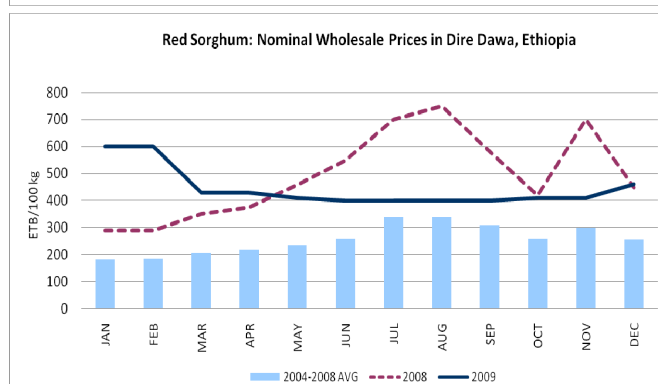
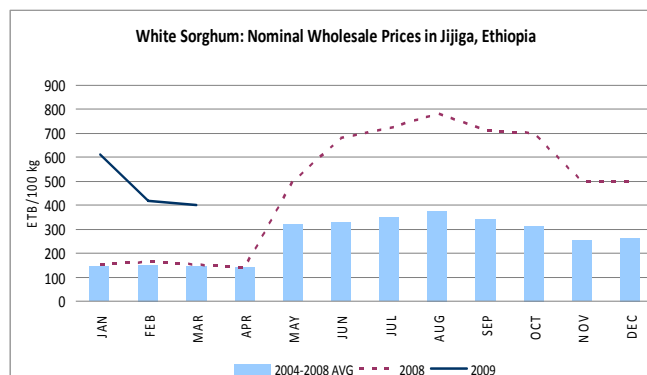
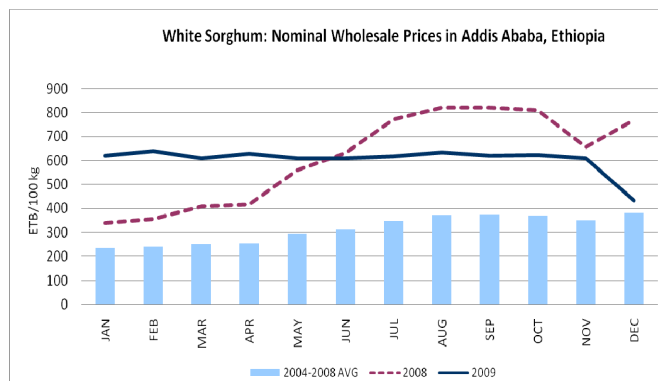
IMPORTED RICE: These are the main retail markets in Djibouti and Somali where imported rice is heavily consumed.

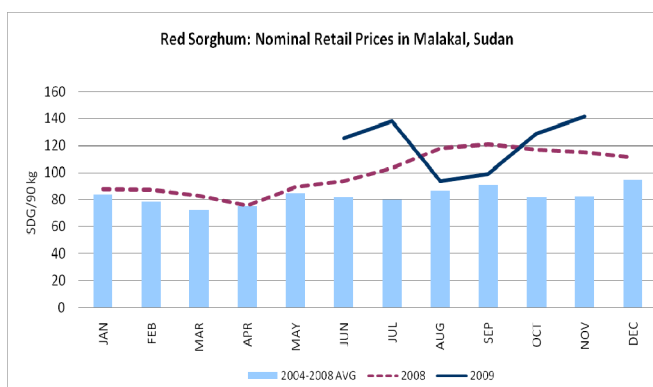
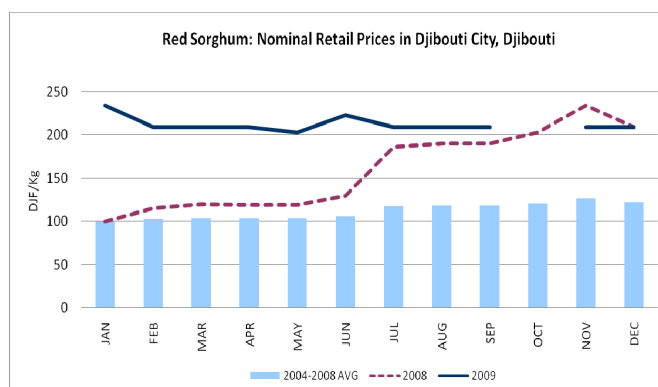


LOCAL RICE: Local rice is produced mostly in Kenya, Uganda and Tanzania. With the exception of Tanzania, most countries in the region are net importers of local rice, which has high demand in urban areas.

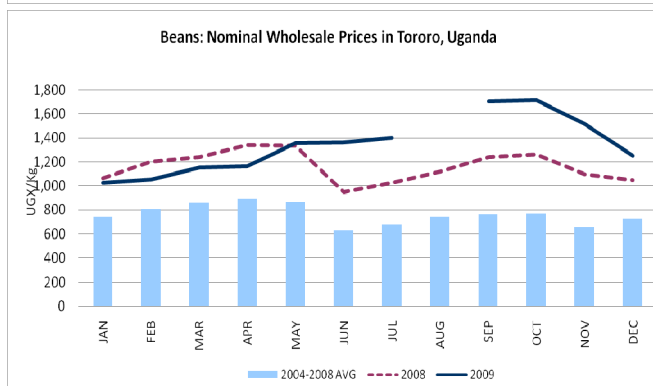
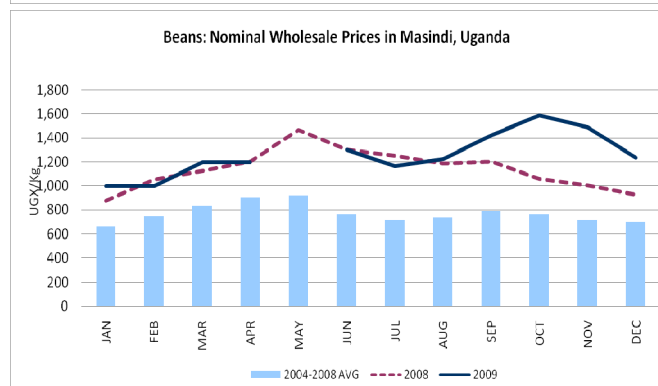
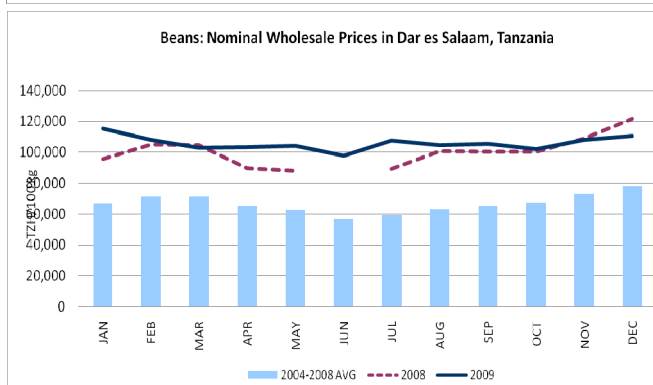
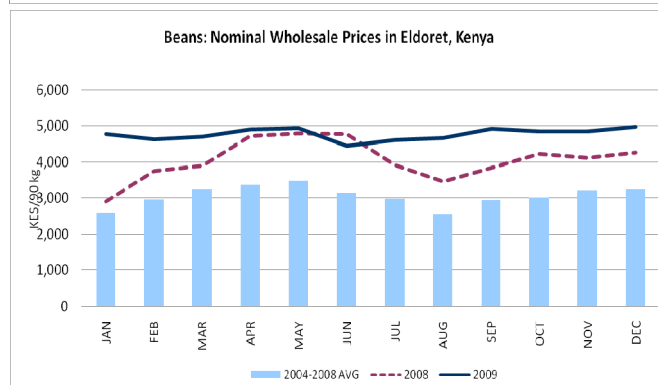
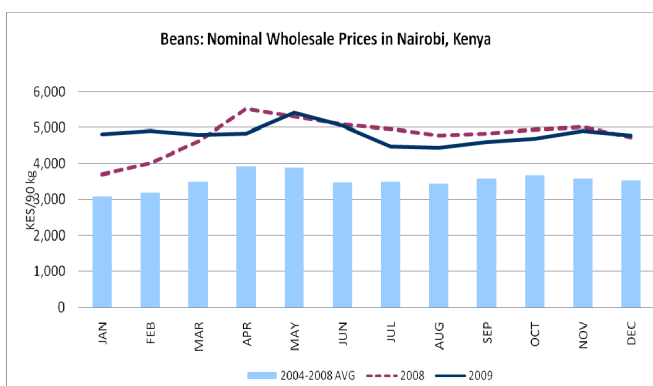
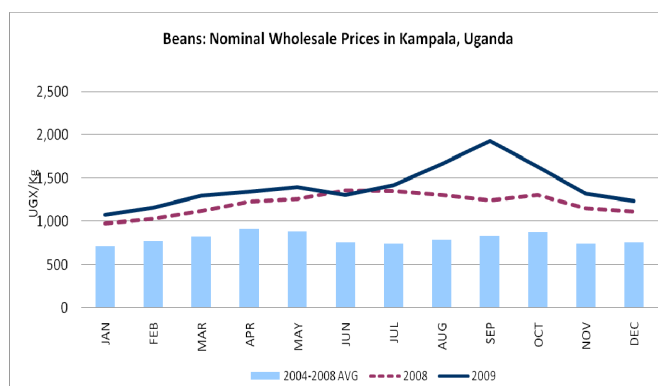


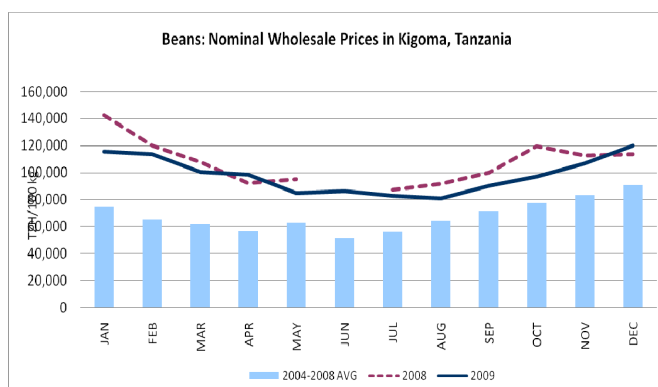
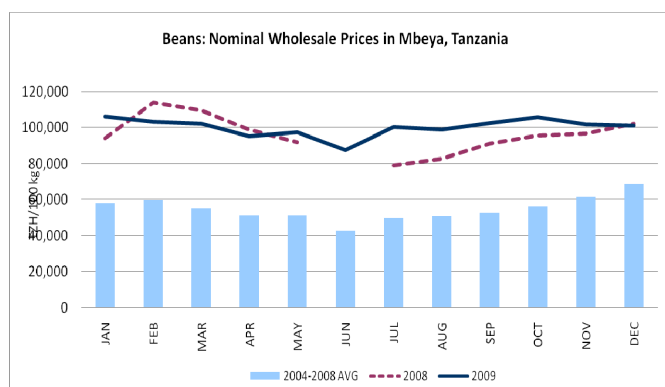
RED AND WHITE SORGHUM: Sorghum, both red and white, is an important consumption and production staple for many households in the region. These markets demonstrate the variety of places it is produced and consumed.





BEANS: Beans are a primary protein source throughout the region, especially in Kenya, Uganda and Tanzania. It is also a staple food in northern Sudan as well as in Rwanda and Burundi. These represent the capital city markets in Kenya, Uganda and Tanzania as well as the main production areas.





MATOKE/BANANA: These are the wholesale and retail prices for matoke, cooking banana, in the capital city market of Uganda.

